ACES 2013 – Managers with Overall Progress Review Ratings & Phase of Form

I. Running the Report

Log into ACES

1) Log into ACES and <u>click</u> on **Reports** tab

2) <u>Click</u> on **Classic Reporting**

3) <u>Click</u> on **Detailed Document Search**

4) <u>Click</u> in radio button **Detailed Search**

5) <u>Select</u> your **Department**, **Division**, and **All Locations** (see sample below)

6) Under **Document Name**: <u>select</u> **Other** and **2013 ACES Form**

7) Under **Export File Format** <u>select</u> SuccessFactors' v4e:

8) <u>Click</u> on **Open Export Options**

9) <u>Click</u> in radio button **overall progress ratings.**

Note:	**Overall progress ratings** report is a shared report in which all ACES coordinators have access. By <u>clicking</u> on the overall progress ratings button, it is automatically selecting the fields needed to run this report.

10) At the bottom of the page, click on **Export Doc Contents (Compact)**

Note:	**The following message may appear at the top of your screen:** Put mouse over the highlighted text and use mouse to right click on the message and select **"Temporary Allow Scripted Windows".** **Click again** on
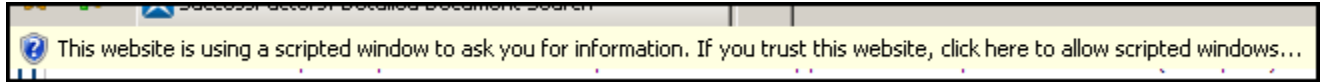
11) A window will appear, prompting you to name the report. **Enter file name** and click **OK**.
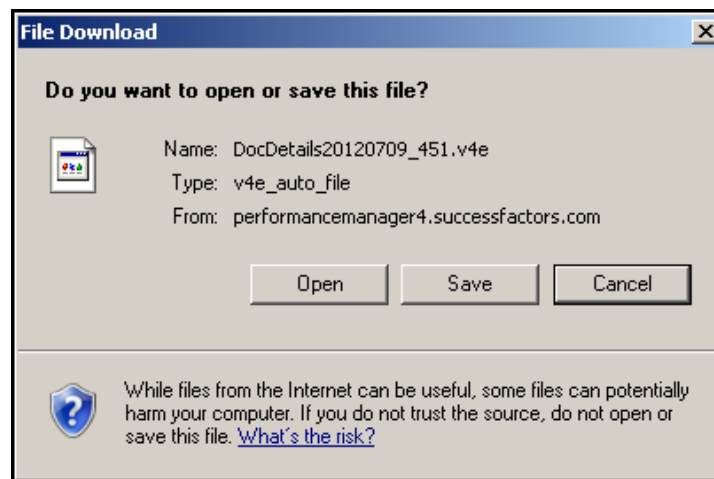

12) The following message will appear indicating that the report has been scheduled to run:

> **Your report has been scheduled. An email will be sent to you when the report is ready for download.
> You can check the status and retrieve results in** *Scheduled Reports*.

13) You will receive an **email notification** once your report is ready to be downloaded. Note: it can take up to ½ hour, depending on the size of the report.

II. Accessing the Report

1) <u>Click</u> on **Reports** **Reports** and **Scheduled Reports** Scheduled Reports

2) <u>Click</u> in the **check box** to the left of the report name.

3) In second Download column, <u>click</u> on **2 files**.

4) Another box will appear in **Download** column. <u>Click</u> on **DocDetailsxxxxxxxx** file (see sample below).

5) <u>Select</u> **Open**.

6) Excel file will open. Data will appear on page like sample below.

7) Highlight **Column A** (see below). From the **Excel toolbar**, select **Data**, and **Text to Columns.**

8) Convert Text to Columns Wizard Window will appear (sample below). Click on **Delimited** and **Next**

9) Under **Delimiters**, <u>select</u> **Other** and enter carrot ^ (see sample below) and click on next [Next >]
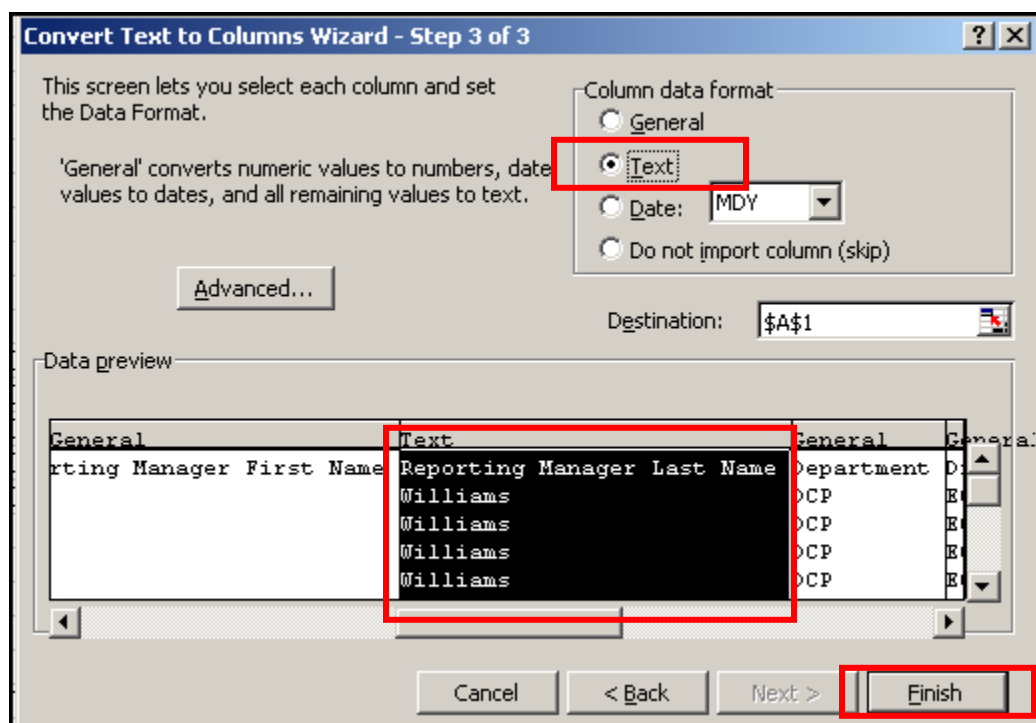
10) Under Data Preview, scroll to the right and <u>highlight</u> **Reporting Manager User ID** column, and under

Column Data Format, <u>select</u> radio button **Text** (see sample below) and <u>click</u> finish [Finish]

11) Once the file has been formatted, <u>click</u> in the upper left hand blank box to select all data in the Excel spreadsheet (data will be highlighted as in sample below).

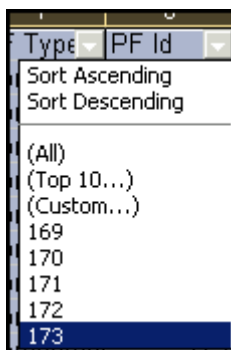|	A	B	C	D	E	F	G
1	Document	Current St	Process O	Reporting I	Reporting I	Reporting I	Departmen
2	32445	Planning	John Smith	231542	Mary	Williams	DCP
3	32445	Planning	John Smith	231542	Mary	Williams	DCP
4	32445	Planning	John Smith	231542	Mary	Williams	DCP
5	32445	Planning	John Smith	231542	Mary	Williams	DCP
6	32445	Planning	John Smith	231542	Mary	Williams	DCP

12) Go to the **Excel Tool bar**, select **Data**, select **Filter**, and **Auto-filter**

13) At the top of the column heading **PF Type**, select **Competency**

```
PF Type      ▼
(All)
(Top 10…)
(Custom…)
Competency
```
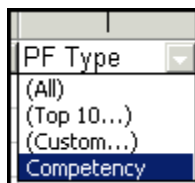
14) At the top of column heading, **PF ID**, select **173**

```
Type ▼  PF Id  ▼
Sort Ascending
Sort Descending

(All)
(Top 10…)
(Custom…)
169
170
171
172
173
```

15) Copy all rows to a new spreadsheet. The data can then be sorted as needed.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Document	Current St	Process O	Reporting I	Reporting I	Reporting I	Departmen	Division	PF Type	PF Id	PF Name	PF Desc	Rating	Rating Des
2	32445	Planning	John Smith	231542	Mary	Williams	DCP	EOAF	Competen	173	Progress Review Overall Rating			